

M&V Plan and Reporting Integration Working Group Update

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Washington DC M&V Summit
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Working Group Highlights

Date Formed: January 15, 2004

Meetings To Date: 3

Objective:

- Revise existing outlines for use across Federal sector
 - M&V Plan, Post-Installation Report, and Annual Report outlines
- Ensure consistency, coordination, and uniformity between outlines and in consideration of other work under development (Commissioning and O&M Reporting WG).

Working Group Members

| | | |
|---------|-------------|---|
| Tony | Robohn | ConEd Solutions |
| Sylvia | Berry-Lewis | Honeywell International Inc. |
| Bonnie | Piest | Johnson Controls |
| Scott | Judson | Noresco |
| Rick | Rogers | Noresco |
| Jason | Stone | Noresco |
| Ron | Araujo | Select Energy Services, Inc. |
| Jerry | Culbert | Select Energy Services, Inc. |
| David | Ward | Energy Engineering & Design, Inc. |
| Michael | Cross | HQ Air Force |
| Gary | Hein | HQ Air Force |
| Pat | Mumme | HQ Air Force |
| Dale | Sartor | Lawrence Berkeley National Laboratory |
| Max | Hogan | Naval Facility Engineering Service Center |
| Lia | Webster | Nexant, Inc. |
| Doug | Dahle | National Renewable Energy Laboratory |
| Robert | Baugh | Oak Ridge National Laboratory |

Background

- The 3 M&V outlines were developed separately over several years:
 - Coordinate content and format between outlines
 - Coordinate content with newer working groups (esp. Commissioning and O&M Reporting)
 - Consider leveraging Annual Report to cover DOE reporting requirements
- Formation of Working Group proposed at the New York City M&V Summit
- WG is many of the same people who originally developed the outlines

Current Status

- Biggest challenges:
 - Coordination with other WGs
 - Keeping outlines contract neutral
- Completed preliminary modifications to Commissioning related items
 - Further discussion with Cx WG planned
- Coordination with O&M Reporting WG planned
- Uniform numbering system for all outlines implemented

Next Steps

WG Deliverable #1: Develop Revised Outlines

- Compare outline formats / organization to ensure consistency to customer and ease of use for ESCOs
- Continue to coordinate with other working group activities
- Annotate outlines to note terminology differences between contracts
- These are 'living documents' which may be modified in the future as needed

WG Deliverable #2: Develop Example Documents

- Modify existing example M&V plan to new format
- Will then consider development of example Post-Install and Annual Reports